

Conversion

A. Introduction

Because there will not be an automated conversion to ACE, the KidsCare Office will need to enter the information from KEDS into ACE.

Renewal applications will require the case to be processed in KEDS, and if approved in ACE.

This process is only affected by renewals that are going to be processed in KEDS.

Intake applications will do an initial search to see if the customer is known to KEDS (See Registering an Initial Application Chapter), but will be processed in ACE.

Changes will be processed in the applicable system that the customer is active on. If the customer is active in KEDS, the change will be processed in KEDS; while if the customer is active in ACE, the change will be processed in ACE.

Note: If the customer is requesting to have a parent or child added on to the case, treat the case like a renewal.

B. Renewals Processed in KEDS

When a renewal comes into the KidsCare Office that was generated by KEDS (KC-1201), the renewal must be processed in KEDS first.

The case will be processed as a renewal normally is in KEDS. Depending on the end result of the renewal will depend on the next action that needs to be taken.

If the renewal disposition ends with the entire family ineligible for KidsCare, discontinue the case with the applicable reason in KEDS. The case will not be entered in ACE.

If the renewal disposition ends with one member of the family still eligible for KidsCare, approve the renewal in KEDS. Then create a change boundary for the next month on the KC370 and discontinue the family using the **AC** disposition reason.

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

TR: KC320 AHCCCS - KIDSCARE (KEDS) 06/24/05
 NTR: C ELIGIBILITY DETERMINATION 14:33:48
 KC01L320

CTL DT: 07/01/2005 CSLD: 91KT01 WORKER-ID: DR0995 AHCCCS:
 NAME: SIMPSON LISA KEDS-ID: K000450104

APP DT: 20040624 AGE: 10 AZ RES: Y CITIZENSHIP: US STATE EMP: N MAIL CD: F
 OTH HLTH INS: N RUN FINANCIAL TESTS? n MDC IND: N A1/A2: HOUSE EXP?:

----- FINANCIAL TEST RESULTS -----

KC CONS AMT: KC STANDARD: RESULT: # IN KC GRP: PREM AMT: 0.00
 XIX CONS AMT: XIX STANDARD: RESULT: RENEWAL: N

----- DISPOSITION -----

CUR KC CHOICE: 010306 NEW KC CHOICE: PRINT NOTICE? n
 DISP CD1: ac CD2: CD3: DISP DATE:
 CHANGE REASON CD1: CD2: CD3:
 XIX DISP: ELG EFF BEG DAT: 07/01/2005

2019 NO ACTION TAKEN

1=HLP 2=KC100 3=COM 4=ERR 5=KC300 6=KC325 7=PV 8=NX 9=UP 10=DN 11=CLR 12=AH000

4B1 ():00.1 19/40

Disconti-
nuance
reason
"AC"

Once the case is closed in KEDS, you will now need to enter the family's information into ACE.

C. Entering a Renewal into ACE

1. Registering the Renewal in ACE

After completing the KEDS disposition, register a KidsCare application using the following steps.

a) Group Assignment Window

1. Click on "Identification". Select "Group Relationship". This takes you to the "Group" window, "Group Assignment" tab.



2. Enter the last name, first name, Date of birth, SSN and gender of the customer.



Be sure that the name, date of birth, SSN and gender are correct when you enter them in ACE.

- Click the **“Search”** button. If no information matches the name a pop-up window will have the statement, **“Search complete. No duplicate names found.”**

The screenshot shows a software window titled "Group" with a tab labeled "Group Assignment". The window contains several input fields and buttons. The "Name" section has "Last: zim", "First: invader", and "M.I.: ". The "Date of birth" is set to "01/05/1979" and "SSN" is "888-88-8888". The "Gender" is set to "F". The "Search" button is highlighted. A pop-up window titled "Duplicate search" is displayed in the center, containing the text "Search complete. No duplicate names found." and an "OK" button. The "Role" section has a list box with "APPLICANT", "PRIMARY INFORMANT", and "OTHER". The "Program Types" section has a list box with "KIDSCARE" and "KC PARENT". The "Source Code" is set to "KIDSCARE". The "Application received" date is set to "/ / ". The window also has a table with columns "Name", "Role", "Appl. Status", "DOB", and "SS".

- Upon returning to the **“Group Assignment”** tab, the information entered for the search is now grayed out, or disabled, and cannot be changed.

First, assign the **“Role”** of the individual by clicking on the appropriate title.

IF the person is...	THEN select...
Approved at renewal for KidsCare or AHCCCS Health Insurance for Parents.	“Applicant”.
The Primary Informant in KEDS (name on the KC205). Note: If the Primary Informant was also approved, the Primary Informant will have the role of “Primary Informant” and “Applicant” .	“Primary Informant”
Inactive after processing the renewal in KEDS	“Other”

5. Type the **“Begin Date”** in the **“Begin Date”** field. This is the renewal stamp date.
6. No action is needed in the **“End Date”** field.
7. For the applicants, check KidsCare or KC Parent (depending on whether the customer is a child or a parent) for the **“Program Type”**. You will not need to do this for the roles of **“Other”** or **“Primary Informant”**.
8. Copy and paste the KEDS ID from the KC220 screen in KEDS into the **“Alt ID”** field (not labeled on the screen).
9. Enter the **“Source Code”** in the **“Source Code”** field. Use the drop-down menu to select from the available choices.
10. Do not enter a **“Priority”** in the **“Priority”** field.
11. Do not enter anything in the **“Application received”** field.

Annotations in the image:

- Role**: Points to the Role dropdown menu.
- Alt ID**: Points to the Alt ID field containing K123456701.
- Program Types**: Points to the Program Types dropdown menu.
- Begin Date**: Points to the Begin date field containing 06/20/2005.
- Source Code**: Points to the Source Code dropdown menu.
- Add to Group**: Points to the Add to group button.

12. Click the **“Add to Group”** button. This action enters the information you entered in the history grid in the bottom section of the window and activates the two following buttons:

Button...	Function...
Update (Only enabled when a person is selected)	Allows you to correct information in the Role, Begin Date, End Date, Program Type, Source

	Code, Priority and Application Received fields. The correction must be done prior to leaving the window.
Remove (Only enabled when a person is selected)	Allows you to delete the individual. The correction must be done prior to leaving the window.

13. Continue Steps 1-13 until the entire household has been registered in ACE then click the “**Forward**” button.

b) Work Management – Assign New Case Window

1. Assign the application to your own caseload.
 - Click on the “**Assign Worker**” button and select your name.

Work Management - Assign New Case

Case Type: UNASSIGNED CASES

Applicant: ZIM, GIR

Zip Code: Get Default Office

Applicant Address:

Select owner for new case:

- AHCCCS
 - [-] CENTRAL
 - [-] REGION 1
 - [-] REGION 2
 - [-] REGION 3
 - [-] REGION 4
 - [-] REGION 5 - BARBARA WHITFIELD
 - [-] REGION 8
 - [+] KIDSCARE ADMIN
 - [-] SSI MAO

Assign Worker

OK Cancel

Back Find OK Cancel Forward

Work Assignment

To Be Assigned...

Work category: UNASSIGNED CASES

Applicant: YAK, OLD SHAVEN

Enter Worker Search Parameters

Worker name: Search by: Worker Name

Region: REGION 9 Job title: (Include all job titles)

Office: KIDSCARE ADMIN

Unit: KIDSCARE UNIT A

Speaks Spanish: ☐ (Click to only display Spanish speaking workers)

Worker Name	Worker ID	Job Title	Caseload Count	Spanish Speaker	Office	Unit
RUDNICK, DAVID	DSRUDNIC	ISD STAFF		N	KIDSCARE	KIDSCARE
SCHAD, BARB	BASCHAD	MANAGERS (BRANCH,		N	KIDSCARE	KIDSCARE
SNYDER, DIANNE	DSSNYDER	ISD STAFF		N	KIDSCARE	KIDSCARE
SOUDER, BOB	RTSOUDER	ISD STAFF		N	KIDSCARE	KIDSCARE
ST. CLAIR, PJ	PJSTCLAI	ES SUPERVISOR - KC		N	KIDSCARE	KIDSCARE
STRAIT, AUTUMN	ARSTRAIT	AUTOMATION 1		N	KIDSCARE	KIDSCARE
VELASQUEZ, RICK	RXVELASQ	ES SUPERVISOR - KC		N	KIDSCARE	KIDSCARE
WALKER, EDWIN	ECWALKER	ISD STAFF		N	KIDSCARE	KIDSCARE

OK Cancel

Type in your last name

Click OK

After you assign the case to yourself click **“OK”** to travel the standard path to the **“Demographics”** tab on the **“Personal Data”** window.

2. Verifying Information

Much of the information that will be entered into ACE will require you to verify the information. Verification in ACE is accessed through a **“Verified”** button. For the purposes of converting information into ACE, you will only need to verify the required verifications. The **“R”** indicates verification is required. The **“N”** indicates verification is not required.

Personal Data (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Living Arrangement Eligibility Citizenship/Residency Student Status Address

Demographic

Group list: HOMER SIMPSON Feb 2005

Name
 Last: SIMPSON First: HOMER Middle initial: Name Change: ☐ Yes ☒ No

Other Name
 Last: First: Middle initial: Name Change: ☐ Yes ☒ No

Marital status: MARRIED Effective date: 10/08/2004 Verified: ☒ Yes ☐ No Language: ENGLISH Verified: ☒ Yes ☐ No

Gender: ☒ M ☐ F DOB: 01/05/1979 Verified: ☒ Yes ☐ No DOD: Verified: ☐ Yes ☒ No

SSN: 123-45-6798 SSN appl date: Verified: ☒ Yes ☐ No Referral: No Verified: ☐ Yes ☒ No

Ethnicity: OTHER Native American: ☐ Yes ☒ No On reservation: ☐ Yes ☒ No

Pregnancy
 Is applicant pregnant: ☐ Yes ☒ No Tribe: Reservation: Willing to pay premium: ☒ Yes ☐ No ☐ Unknown Verified: ☒ Yes ☐ No

How many children are expected: Expected due date: Verified: ☐ Yes ☒ No

Back Find OK Cancel Forward

Required Verifications

Not Required Verifications

This will bring up the “**Verification Detail**” window. For the conversion from KEDS to ACE, select the appropriate verification in ACE that was used in KEDS. For instructions on verifications, see the **Verification Chapter**.

Verification Detail (MARGE SIMPSON - APPLICANT - 100061752, 2...

Description: WAGES
 Qualifier: Target
 Value: \$200.00
 Verified: Yes

Verification

Date: / / ☐ Collateral ☐ Document
☐ Client Statement ☐ Visual ☐ Declaration

Form

☒ Include Form on RFI Due: Resolved: / /
 VERIFICATION - EMPLOYMENT

Request For Information

☒ Include Verification on RFI Due: Resolved: / /
 Instructions: ☒ English ☐ Spanish
 A copy of pay stubs or a letter from the employer that shows the gross amount of income for the month(s) of May.

Comments

1/5/05 Left message for customer at home phone #.

Different types of verification

! If information was verified by collateral contact, be sure to make reference to the collateral contact form in Fortis.

a) Demographic Tab

1. Before entering information on this window, ensure that the information you enter is for the correct group member. All members known to a particular group are displayed in the **"Group List"** field.

To open the drop down list, click on the down arrow for **"Group List"**. Select the individual for whom you want to enter information from the list.

Personal Data (BART SIMPSON - APPLICANT - 100061753, 2/1/2005)

Living Arrangement	Eligibility	Student Status	Address
Demographic			
Group list: BART SIMPSON			
Feb 2005			
Name: HOMER SIMPSON			
Last: SIMPSON			
First: BART			
Middle initial:			
Name Change: <input type="radio"/> Yes <input checked="" type="radio"/> No			
Other Name: BART SIMPSON			
Last:			
First:			
Middle initial:			
Name Change: <input type="radio"/> Yes <input checked="" type="radio"/> No			
Marital status: NEVER MARRIED			
Effective date:			
Verified: No			
Language: ENGLISH			
Gender: <input checked="" type="radio"/> M <input type="radio"/> F			
DOB: 02/16/1998			
Verified: Yes			
DOD:			
Verified:			
SSN: 999-99-9654			
SSN appl date:			
Verified: No			
Referral:			
Ethnicity: UNKNOWN			
Native American:			
Tribe:			
Reservation:			
On reservation: <input type="radio"/> Yes <input checked="" type="radio"/> No			
Pregnancy:			
Is applicant pregnant: <input type="radio"/> Yes <input checked="" type="radio"/> No			
How many children are expected:			
Expected due date:			
Verified:			
Willing to pay premium:			
<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown			
Verified: Yes			
Back Find OK Cancel Forward			

Group List



If you entered the name, date of birth, SSN or gender incorrectly, you will need to fix it on this screen.

2. Enter the following information:

- Marital status
- Language
- Ethnicity
- Pregnancy
- Willing to pay premium

Personal Data (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Living Arrangement Eligibility Citizenship/Residency Student Status Address

Demographic

Group list: HOMER SIMPSON Feb 2005

Name
Last: SIMPSON First: HOMER Middle initial: Name Change: ☐ Yes ☒ No

Other Name
Last: First: Middle initial: Name Change: ☐ Yes ☒ No

Marital status: MARRIED Effective date: 10/08/2004 Verified: Yes ☒ R Language: ENGLISH Verified: ☐ Yes ☒ No

Gender: ☒ M ☐ F DOB: 01/05/1979 Verified: Yes ☒ N DOD: Verified: ☐ Yes ☒ No

SSN: 123-45-6798 SSN appl date: Verified: No ☒ R Referral: No Verified: ☐ Yes ☒ No

Ethnicity: OTHER Native American: On reservation: ☐ Yes ☒ No

Tribe: Reservation: Willing to pay premium: ☒ Yes ☐ No ☐ Unknown Verified: Yes ☒ N

Pregnancy
Is applicant pregnant: ☐ Yes ☒ No
How many children are expected: Expected due date: Verified: ☐ Yes ☒ No

Back Find OK Cancel Forward

3. Verify the following items on the Demographic Tab.

- Marital Status
- SSN
- Pregnancy (females only)

4. When you have completed the entries for all group members, click on the **“Forward”** button to continue to the next tab in the Standard Path, which is the **“Relationship”** tab on the **“Group”** window.

b) Relationship Tab

1. Determine what (if any) relationship the customer has to the other members of the household on the **“Relationship”** tab.
2. Select a parent from the Group List.

Group (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Group Assignment Relationship

Group list: HOMER SIMPSON Control date: Feb 2005

Relationships:

- SPOUSE OF
- CHILD OF
- PARENT OF**
- SIBLING OF
- PARENT OF ADULT
- STEP-PARENT OF
- FOSTER-PARENT OF
- GRANDPARENT OF
- UNCLE OF
- AUNT OF

Group members:

	Age:	Household:
MARGE SIMPSON	26	<input checked="" type="checkbox"/>
BART SIMPSON	6	<input checked="" type="checkbox"/>
LISA SIMPSON	3	<input checked="" type="checkbox"/>

Household

Add

Remove

Group relationships:

HOMER SIMPSON	SPOUSE OF	MARGE SIMPSON
HOMER SIMPSON	PARENT OF	LISA SIMPSON
HOMER SIMPSON	PARENT OF	BART SIMPSON
MARGE SIMPSON	PARENT OF	BART SIMPSON
MARGE SIMPSON	PARENT OF	LISA SIMPSON

Back Find OK Cancel Forward

Group List

- In the “**Relationships**” grid, click on the relationship that best describes the adult or parent’s relationship to the group member and click “**Add**”.

!

If you hold the “**Shift**” key, you can click on multiple people. In the example above, Homer is parent of Bart and Lisa. If you hold the “**Shift**” key, you can select both Bart and Lisa so when you click the “**Add**” button, both relationships will appear in the “**Group relationships**” grid.

Group (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Group Assignment Relationship

Group list: HOMER SIMPSON Control date: Feb 2005

Relationships:

- SPOUSE OF
- CHILD OF
- PARENT OF**
- SIBLING OF
- PARENT OF ADULT
- STEP-PARENT OF
- FOSTER-PARENT OF
- GRANDPARENT OF
- UNCLE OF
- AUNT OF

Group members:

Group members:	Age:	Household:
MARGE SIMPSON	26	<input checked="" type="checkbox"/>
BART SIMPSON	6	<input checked="" type="checkbox"/>
LISA SIMPSON	3	<input checked="" type="checkbox"/>

Household

Add

Remove

Group relationships:

HOMER SIMPSON	SPOUSE OF	MARGE SIMPSON
HOMER SIMPSON	PARENT OF	LISA SIMPSON
HOMER SIMPSON	PARENT OF	BART SIMPSON
MARGE SIMPSON	PARENT OF	BART SIMPSON
MARGE SIMPSON	PARENT OF	LISA SIMPSON

Back Find OK Cancel Forward

Relationships

- Continue to repeat the steps for each adult or parent member of the group until you identify all the relationships that are parent to child or parent to spouse. If the customer is not related to a member of the group, indicate this by selecting **“Not related to”** from the **“Relationships”** list.

If you realize you have a group member incorrectly in the household, click on the group member's name in the **“Group Members”** grid causing it to be highlighted, then click **“Household”**.

If you realize you have assigned the incorrect relationship, click on the group member's name in the **“Group Relationships”** grid causing it to be highlighted, then click **“Remove”**.



ACE defaults everyone who is registered in the case to be in the household. Be sure to not link any people who are in the case but not in the household.

- When you have completed all entries, click on the **“Forward”** button to continue to the next tab in the Standard Path, which is the **“Address”** tab on the **“Personal Data”** window.

c) Address Tab

1. Before entering any information on a tab, make sure the primary informant's window is displayed. Enter the **"Residence"** address and phone number.

ACE automatically determines the **"Residence County"** when a complete address is entered in the **"Residence"** grid.

To use the same residence address for the entire group, click on the **"Copy residence to household"** button, and the residence address will automatically be copied to the rest of the group.

Personal Data (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Living Arrangement Eligibility

Demographic Citizenship/Residency Student Status Address

Group list: HAN SOLO ☒ Member of household Aug 2004

Residence

Street 1: 1234 N. Chewbacca St Street 2: #99

City: Phoenix State: AZ Zip: 85008 Country: U.S.A.

Residence county: MARICOPA

Home: 602-555-9512 Ext: Business: - - Ext:

Cell/Pager: - - Ext: E-mail:

Copy residence to household Copy residence to person... Copy residence to mailing

Mailing

Street 1: Street 2:

City: State: Zip: Country: U.S.A.

Copy mailing to household Copy mailing to person... Copy mailing to residence

Correspondence Language:

Back Find OK Cancel Forward

Copy
residence to
household

2. If the residence address is the same as the mailing address, click **"Copy residence to mailing"**.

To use the same mailing address for the entire group, click on the **"Copy mailing to household"** button, and the mailing address will automatically be copied to the rest of the group.

Personal Data (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Living Arrangement Eligibility

Demographic Citizenship/Residency Student Status **Address**

Group list: HAN SOLO ☒ Member of household Aug 2004

Residence

Street 1: 1234 N. Chewbacca St Street 2: #99

City: Phoenix State: AZ Zip: 85008 Country: U.S.A.

Residence county: MARICOPA

Home: 602-555-9512 Ext: Business: - - Ext:

Cell/Pager: - - Ext: E-mail:

Copy residence to household Copy residence to person... Copy residence to mailing

Mailing

Street 1: 1234 N. Chewbacca St Street 2: #99

City: Phoenix State: AZ Zip: 85008 Country: U.S.A.

Copy mailing to household Copy mailing to person... Copy mailing to residence

Correspondence Language:

Back Find OK Cancel Forward

Copy residence to mailing

Copy mailing to household

- The “**Correspondence Language**” field is on the bottom of the “**Address**” tab. Click on the ▼ (down arrow) and select the correct correspondence language.

Note: The “**Correspondence Language**” field of the Primary Informant will determine the language of the notices and forms ACE sends to the customer.

Personal Data (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Living Arrangement Eligibility

Demographic Citizenship/Residency Student Status **Address**

Group list: HAN SOLO ☒ Member of household Aug 2004

Residence

Street 1: 1234 N. Chewbacca St Street 2: #99

City: Phoenix State: AZ Zip: 85008 Country: U.S.A.

Residence county: MARICOPA

Home: 602-555-9512 Ext: Business: - - Ext:

Cell/Pager: - - Ext: E-mail:

Copy residence to household Copy residence to person... Copy residence to mailing

Mailing

Street 1: 1234 N. Chewbacca St Street 2: #99

City: Phoenix State: AZ Zip: 85008 Country: U.S.A.

Copy mailing to household Copy mailing to person... Copy mailing to residence

Correspondence Language: ENGLISH

Back Find OK Cancel Forward

Correspondence Language

4. When you have completed all entries, click on the **“Forward”** button to continue to the next tab in the Standard Path, which is the **“Eligibility”** tab.

d) Eligibility Tab

1. To have ACE interface with PMMIS, click on the **“Search”** button.

ACE automatically conducts a search by using the AHCCCS ID if one is known. Otherwise, ACE will use the Social Security Number to search for a match. If it does not find a match for any of the information entered, the eligibility and enrollment fields will remain blank and the ACE pop-up box will appear with the message **“No AHCCCS ID exists for this person.”**

! If the customer does not have a Social Security Number, the **“Search”** button will be disabled.

Personal Data (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Demographic Citizenship/Residency Student Status Address

Living Arrangement **Eligibility**

Group list: HOMER SIMPSON

Demographic Information

Last name: SIMPSON First name: HOMER

Date of birth: 01/05/1979 Age: 26 SSN: 123-45-6798

Eligibility

Health Plan	Contract Type	Begin Date	End Date	Rate Code	County
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Feb 2005

AHCCCS ID:

As of date: 11/05/2004

Search

Request PAS

Determined

☐ Disabled ☐ Blind Diary date: / /

Verified: ☐

SSI cash

☐ Yes ☒ No

Foster Care

☐ Yes ☒ No

Back Find OK Cancel Forward

2. If the customer receives **SSI Cash**, click the **“Yes”** radio button. If the customer does not receive **SSI Cash**, click **“No”**.

Personal Data (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Demographic Citizenship/Residency Student Status Address

Living Arrangement **Eligibility**

Group list: HOMER SIMPSON Feb 2005

Demographic Information

Last name: SIMPSON First name: HOMER

Date of birth: 01/05/1979 Age: 26 SSN: 123-45-6798

AHCCCS ID:

As of date: 11/05/2004

Search

Request PAS

Eligibility	Begin Date	End Date

Health Plan	Contract Type	Begin Date	End Date	Rate Code	County

Determined

☐ Disabled ☐ Blind Diary date: Verified: ☐

SSI cash: ☐ Yes ☒ No Foster Care: ☐ Yes ☒ No

Back Find OK Cancel Forward

SSI Cash

- The Foster Care field is disabled for adults and defaults to “No” for children. If the customer receives **Foster Care**, click the “Yes” radio button.

Personal Data (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Demographic Citizenship/Residency Student Status Address

Living Arrangement **Eligibility**

Group list: HOMER SIMPSON Feb 2005

Demographic Information

Last name: SIMPSON First name: HOMER

Date of birth: 01/05/1979 Age: 26 SSN: 123-45-6798

AHCCCS ID:

As of date: 11/05/2004

Search

Request PAS

Eligibility	Begin Date	End Date

Health Plan	Contract Type	Begin Date	End Date	Rate Code	County

Determined

☐ Disabled ☐ Blind Diary date: Verified: ☐

SSI cash: ☐ Yes ☒ No Foster Care: ☐ Yes ☒ No

Back Find OK Cancel Forward

Foster Care

- When you have completed all entries for everyone in the household, click on the “**Forward**” button to continue to the next tab in the Standard Path, which is the “**Citizenship/Residency**” tab.

e) Citizenship/Residency Tab

1. The first grid is “**Citizenship**”. If the customer is a U.S. citizen, click on the “**Yes**” radio button. **Note:** This is a required verification.

Personal Data (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Living Arrangement Eligibility Student Status Address

Demographic **Citizenship/Residency**

Group list: HAN SOLO Aug 2004

Citizenship

U.S. citizen: ☒ Yes ☐ No Verified: **Yes** **R** Location born: _____

INS status: _____ Verified: ☐

Prior INS status: _____

INS status date: ____/____/____ Resided since: ____/____/____ INS card number: _____

SAVE referral date: ____/____/____ Secondary SAVE date: ____/____/____ Follow-up date: ____/____/____

Residency

AZ resident: ☒ Yes ☐ No Verified: **Yes** **N** Private Request PAS use only

Moving to AZ ind: ☐ Yes ☐ No Date moved to AZ: ____/____/____

Temporary Absence

Date leaving AZ: ____/____/____ Date returning AZ: ____/____/____

Back Find OK Cancel Forward

US Citizen

2. If the customer is a qualified non-citizen (KEDS code **QV**) click on the “**No**” radio button. Research the original intake application to determine the exact non-citizen status that they were approved under and enter that status information into ACE.

Personal Data (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Living Arrangement Eligibility Student Status Address

Demographic Citizenship/Residency

Group list: HAN SOLO Aug 2004

Citizenship

U.S. citizen: ☐ Yes ☒ No Verified: ☐ No ☒ R Location born: Djibouti

INS status: LAWFUL PERMANENT RESIDENT Verified: ☐ No ☒ R

Prior INS status: NONE OF THE ABOVE

INS status date: 08/15/1999 Resided since: / / INS card number: A123456789

SAVE referral date: 08/24/2004 Secondary SAVE date: / / Follow-up date: / /

Residency

AZ resident: ☒ Yes ☐ No Verified: ☒ Yes ☐ N Private Request PAS use only

Moving to AZ ind: ☐ Yes ☐ No Date moved to AZ: / /

Temporary Absence

Date leaving AZ: / / Date returning AZ: / /

Back Find OK Cancel Forward

Non-citizen status information

3. The next grid is “**Residency**”. Use the “**Yes**” or “**No**” radio buttons to indicate if the customer meets the definition of an Arizona resident.

Note: When the “**Yes**” radio button is selected, ACE automatically defaults to verified by “**Client Statement**” however, you can enter other verification if the residency is questionable and additional verification was required.

Personal Data (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Living Arrangement Eligibility Student Status Address

Demographic Citizenship/Residency

Group list: HAN SOLO Aug 2004

Citizenship

U.S. citizen: ☒ Yes ☐ No Verified: ☒ Yes ☐ R Location born:

INS status: Verified: ☐

Prior INS status:

INS status date: / / Resided since: / / INS card number:

SAVE referral date: / / Secondary SAVE date: / / Follow-up date: / /

Residency

AZ resident: ☒ Yes ☐ No Verified: ☒ Yes ☐ N Private Request PAS use only

Moving to AZ ind: ☐ Yes ☐ No Date moved to AZ: / /

Temporary Absence

Date leaving AZ: / / Date returning AZ: / /

Back Find OK Cancel Forward

Residency

4. When you have completed all entries, click the **“Forward”** button to continue to the next tab in the Standard Path, which is the **“Student Status”** tab.

f) Student Status Tab

1. This window is used to identify household members who are under the age 19, employed, and meet the definition of student. If a member meets the definition of student, certain deductions may apply in the Medicaid screening income calculations.

If the group members do not meet the definition of student and are employed, click the **“Not Applicable”** radio button. Once **“Not Applicable”** has been selected, no further entries are necessary for this tab.

The screenshot shows a software window titled "Personal Data (DWEEZIL ZAPPA - APPLICANT - 100063200, 5/1/2005)". It has several tabs: "Living Arrangement", "Eligibility", "Demographic", "Citizenship/Residency", "Student Status" (which is active), and "Address".

Inside the "Student Status" tab, the "Group list" is set to "DWEEZIL ZAPPA" and a date dropdown is set to "May 2005". Under "Student Indicator", the "Full-time" radio button is selected. The "Verified:" section has "Yes" selected with a red "R" in a box. The "Type of school" is "SCHOOL (GRADES 7 - 12)". The "Begin date" is "08/22/2004" and the "Graduation date" is "05/22/2007". The "School name" is "Weasels Rip Your Flesh High School". The address fields show "Street 1: 1234 Yellow Snow Dr", "City: Phoenix", "State: AZ", and "Zip: 85008". There are also fields for "Business phone", "Ext.", and "Fax".

At the bottom of the window are buttons for "Back", "Find", "OK", "Cancel", and "Forward".

2. When you have completed all entries, click on the **“Forward”** button to continue to the next window in the Standard Path, which is **“Income”**.

g) Income Window

1. Enter all the income in the household on the Income window. Enter the considered income amount as it appears on the KC270. See the **Income Chapter** for instructions on entering income.

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

TR: KC270 AHCCCS - KIDSCARE (KEDS) 06/24/05
 NTR: I CASE INCOME SUMMARY 14:31:10
 KC01L270

CTL DATE: 06/24/2005
 CASE-ID: K0004501 CSLD: 91KT01 WORKER-ID: DR0995

CD	OWNR	DESCRIPTION	INC TYP	FQY	GROSS INCOME	CONSIDERED AMOUNT	KED TRT	MDC TRT
WG	AD01	SPRINGFIELD NUCLEA	I	W	712.50	712.50	C	C

2011 END OF FILE

1=HELP 2=KC100 5=PREV 6=KC280 7=BCK 8=FWD 9=SCRLUP 10=SCRLDN 12=AH000

4B1 ():00.1 03/07

Income taken
from KEDS

- Once all income has been entered into the case and verified, click on the **“Forward”** button until you get to the next tab in the Standard Path, which is the **“Medicare”** tab on the **TPL** window.

h) TPL Window

- Only enter current Medicare, health insurance and state employment information in ACE. See the **TPL Chapter** for instructions on entering this information. Do not enter terminated Medicare or health insurance, unless someone was approved with the three-month bare period.
- Once all Medicare, health insurance and state employment information has been entered into the case and verified, click on the **“Forward”** button to continue to the next tab in the Standard Path, which is the **“Enrollment Choice”** tab.

i) Enrollment Choice Window

The Enrollment Choice tab allows you to enter the health plan choice.

- Select the health plan that the customer picked (from the health plan choice on the RP160) from the acute care option drop down.
- Check the **“Apply to All Applicants”** box if the entire household selects the same health plan.

3. Select Primary Informant from the “**Selected by**” drop down box.

Enrollment Choice (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Program Contractor Search

Applicant list: HOMER SIMPSON Control date: Feb 2005

Fiscal county: Resident county: MARICOPA Program type: KC PARENT

Enrollment change reason:

Enrollment Selection:

☒ Apply to all applicants Verified: Yes N

ALTCS option: Acute care option: ARIZONA PHYSICIANS IPA Selected by: APPLICANT

Back Find OK Cancel Forward

Apply to all applicants

Health plan

Selected by

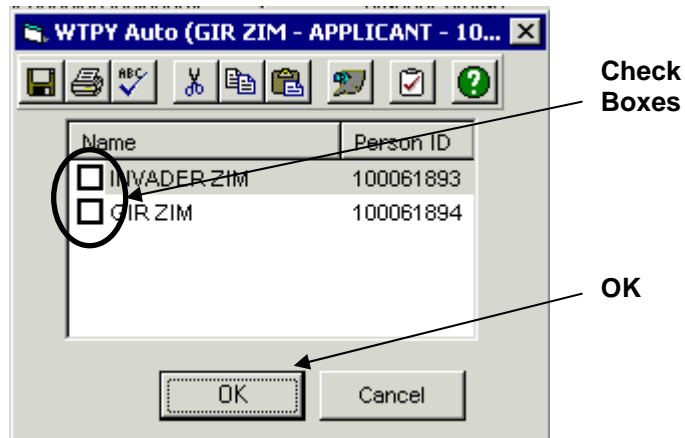
4. Once the enrollment choice has been entered into the case, click on the “**Forward**” button to continue to the next tab in the Standard Path, which is the “**Case Status Summary**” window.

j) Requesting a WTPY

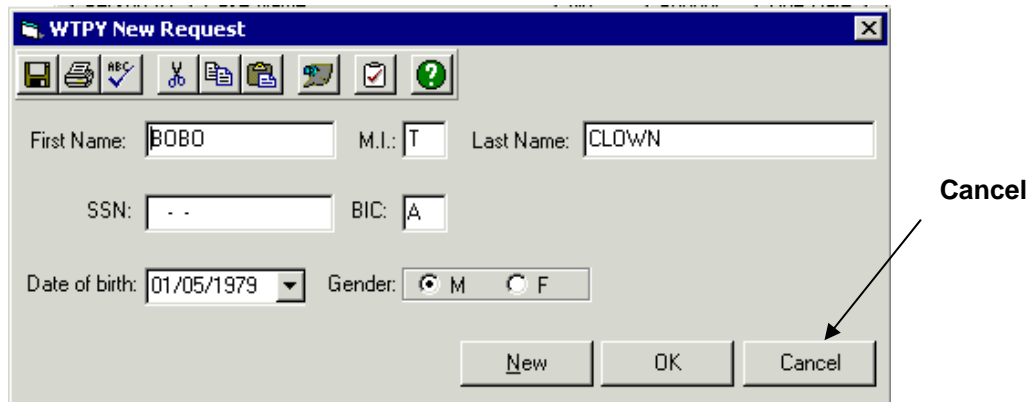
1. For the conversion, you will only have to order the WTPY, but do not have to wait for the response. From the “**Case Status Summary**” window, on the “**Icon Toolbar**”, click on the “**WTPY**” button. A pop-up window appears displaying the names of the group participants.



2. Click on the box next to all the customers' names for which you are ordering a WTPY.
3. Click “**OK**”. This closes the pop-up window and orders the WTPY.



4. If the customer does not have a Social Security Number, a **“WTPY New Request”** window will appear. Click the **“Cancel”** button.



k) Comments

1. To access comments, click **“General”** on the main menu then clicking on **“Comments”** on the drop down menu, or by clicking on the  **“Comments”** icon located on the toolbar.

Comments (BART SIMPSON - APPLICANT - 100061753)

Group list: BART SIMPSON Window list: frmWorkMgmtTasks Worker list: DAVID RUDNICK Comment dates: All Dates

Print OK Cancel

2. New comments are entered in the lower portion of the window. Click in the lower portion of the window to position the cursor in this area. Type, **“Renewal converted from KEDS”**.

Comments (ANAKIN SKYWALKER - PRIMARY INFORMANT - 100062914)

Group list: All Group Members Window list: All Windows Worker list: All Workers Comment dates: All Dates

Renewal converted from KEDS

Print OK Cancel

Lower portion of the window

3. Once you have completed the comment, clicking **“OK”** adds the comment, and closes the comment window.

I) Case Status Summary

1. The first step upon completion of the entry of data from KEDS to ACE is to edit the case. To edit the case, click on **“Edit Case”** button.

Case Status Summary (HOMER SIMPSON - APPLICANT - 100061751)

Program: ALL PROGRAMS Current control date only: ☒ From: 02/19/2004 Through: 02/18/2006

Control Dt	Category	Description	Verify Dt
SIMPSON, BART			
2/1/2005	Verification	AGE	2/3/2005
2/1/2005	Verification	CHILD SUPPORT	
2/1/2005	Verification	MARITAL STATUS	
2/1/2005	Verification	SSN	
2/1/2005	Verification	WILLING TO PAY PREMIUM	2/3/2005
2/1/2005	Verification	THIRD PARTY LIABILITY	
2/1/2005	Verification	STUDENT	
2/1/2005	Verification	STUDENT	
SIMPSON, HOMER			
	Referral	SS-6-Social security number application request	
2/1/2005	Verification	AGE	2/3/2005
2/1/2005	Verification	ENROLLMENT CHOICE	2/3/2005
2/1/2005	Verification	ENROLLMENT CHOICE	2/3/2005

Unresolved

Find OK

Detail Override Refresh List Edit Case Latest edit: Application Rpts & Forms Add to RFI

2. Once you are on the **“Edit Case”** pop-up window click on the **“Edit Case”** button, ACE begins the editing process. The fields on the **“Edit Case”** window that were previously blank now have information displayed. As ACE edits the case, each group member’s name is displayed as the mandatory entries are checked for that group member. This is a continuous process performed by ACE, until all group members’ entries have been edited.

Edit Case

Applicant:

Control Date:

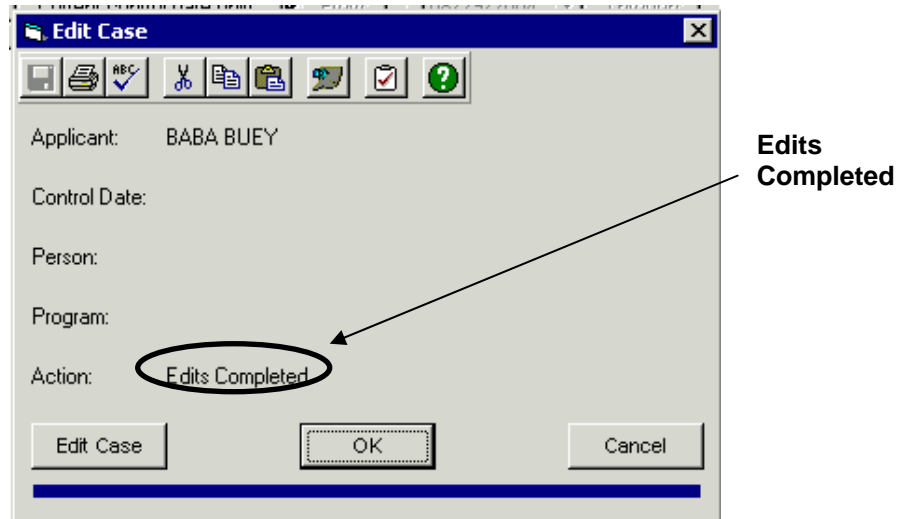
Person:

Program:

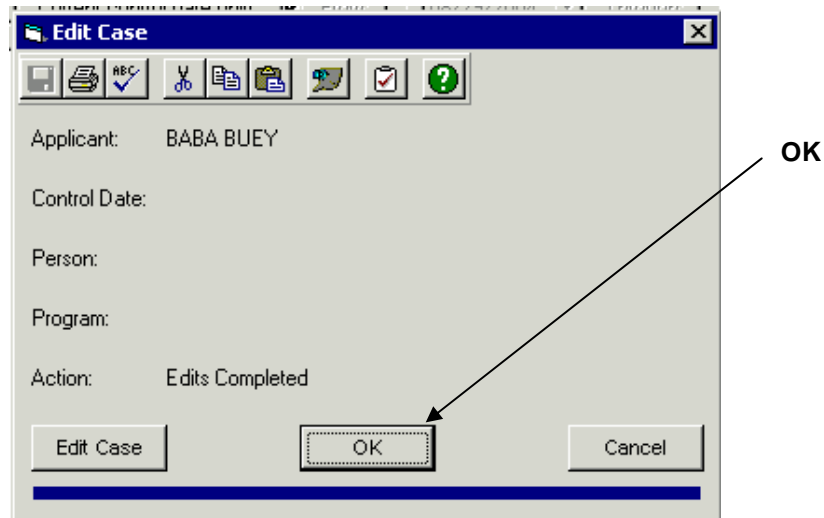
Action:

Edit Case OK Cancel

3. When ACE has completed the editing process, the **“Action”** field displays the message **“Edits Complete”**.



4. To close the “**Edit Case**” pop-up window, and return to the “**Case Status Summary**” window, click “**OK**”.



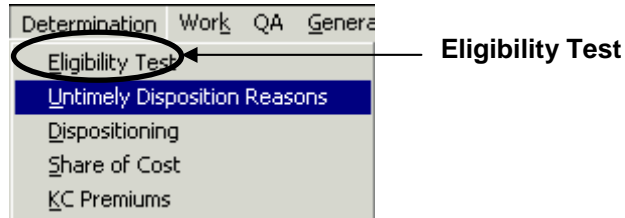
5. When you edit the case, all categories (edit, form, referral, and verification) will appear. In ACE, edit items are color-coded based on the actions that have been, or need to be, taken:

If the edit item is...	The edit item color is...
Unresolved	Red
Resolved	Black
Overridden	Blue

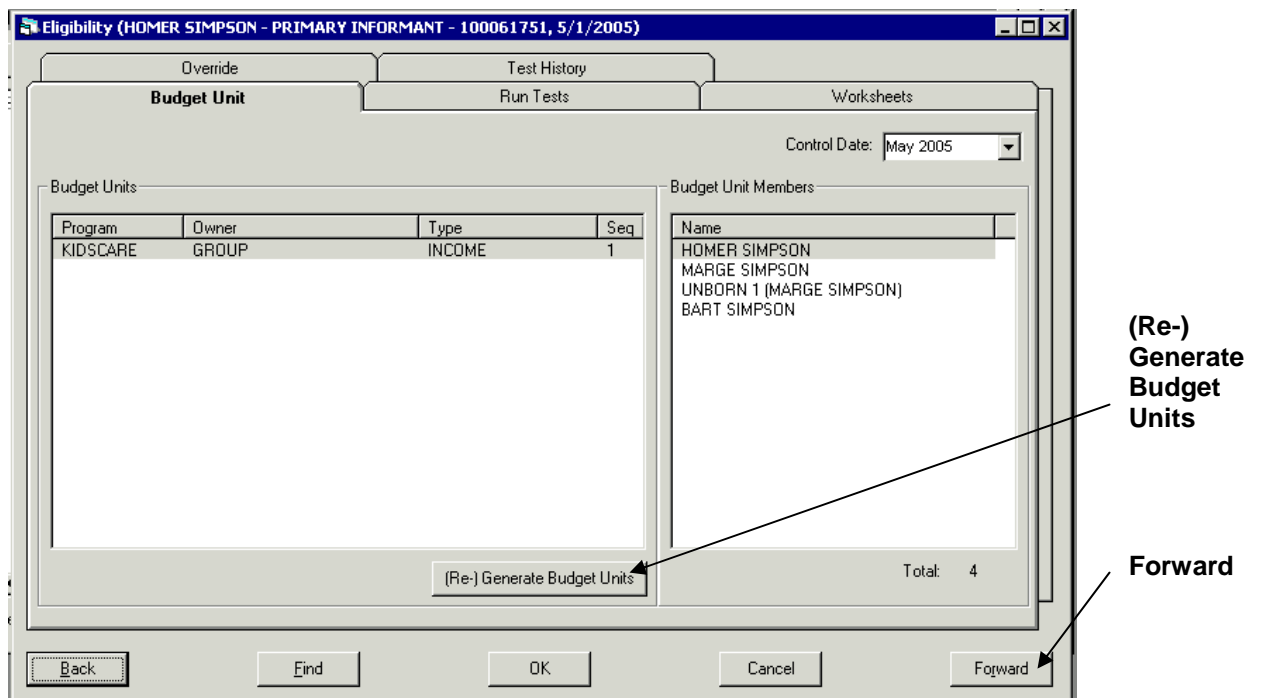
6. Resolve any edits that are red.
7. Click “**OK**”.

m) Eligibility Test

1. Before dispositioning the case, the eligibility test will need to be run. To access the “**Eligibility**” window on the main menu, click “**Determination**”. On the drop down menu, select “**Eligibility Test**”.



2. ACE displays the income group and the names of the members of the income group. Be sure to see if the income group is correct. If it is not correct it needs to be fixed on the “**Relationship**” tab on the “**Group**” screen. When you return to this tab, click on the “**(Re-) Generate Budget Units**” button. When you have reviewed budget unit information and it is correct, click on the “**Forward**” button to continue to the next tab, “**Run Tests**”.



3. On the “**Run Tests**” tab, click on the “**Select and Run All**” button to run the tests for everyone.

Eligibility (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Override Test History

Budget Unit **Run Tests** Worksheets

Applicant	Control Date	Program
SIMPSON, BART	2/1/2005	KIDSCARE
SIMPSON, HOMER	2/1/2005	KC PARENT
SIMPSON, MARGE	2/1/2005	KC PARENT

Select and Run All

Run Tests

Applicant Name	Control Date	Program	Category	Effective Date	Test Type	Test Result

Running eligibility tests (0%)

Select and Run All

4. When ACE is in the process of running the tests, there is a progress bar at the bottom of the “**Tests Summary**” field. The line continues across the field until all tests are completed.

Eligibility (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Override Test History

Budget Unit **Run Tests** Worksheets

Applicant	Control Date	Program
✓ SIMPSON, BART	2/1/2005	KIDSCARE
✓ SIMPSON, HOMER	2/1/2005	KC PARENT
✓ SIMPSON, MARGE	2/1/2005	KC PARENT

Select and Run All

Run Tests

Applicant Name	Control Date	Program	Category	Effective Date	Test Type	Test Result

Starting eligibility tests (7%)

Progress Bar

5. This will tell you which tests (Non financial, FPL Test, Income, Medicaid Screening, Verification, Edits) fail for which applicants.

Eligibility (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Override Test History

Budget Unit **Run Tests** Worksheets

Applicant	Control Date	Program
✓ SIMPSON, BART	2/1/2005	KIDSCARE
✓ SIMPSON, HOMER	2/1/2005	KC PARENT
✓ SIMPSON, MARGE	2/1/2005	KC PARENT

Select and Run All

Run Tests

Test Type

Test Result

Applicant Name	Control Date	Program	Category	Effective Date	Test Type	Test Result
SIMPSON, HOMER	2/1/2005	KC PARENT		5/1/2005	MEDICAID SCREENING	FAIL
					NON FINANCIAL	FAIL
					VERIFICATION	FAIL
SIMPSON, MARGE					MEDICAID SCREENING	FAIL
					NON FINANCIAL	NOT COMPLETE
					VERIFICATION	FAIL
SIMPSON, BART		KIDSCARE		9/1/1999	FPL TEST	150%

Starting eligibility tests (100%)

- When you have reviewed the test summary information, click on the **“Forward”** button to continue to the next tab, **“Worksheets”**.
- The **“Worksheets”** tab displays the eligibility test calculations and results. The vertical scroll bar allows you to view the full worksheet. To select another customer who is part of the same group, click on the ▼ (down arrow) on the **“Applicant list”**, and click on the other customer’s name. Once the worksheets have been viewed for all applicants, click **“OK”** to close this window.

Eligibility (BART SIMPSON - APPLICANT - 100061753, 5/1/2005)

Override Test History

Budget Unit Run Tests **Worksheets**

Applicant list: BART SIMPSON Control Date: May 2005

Program	Disp Date	Test	Test Type	Item	Value
KIDSCARE		NON FINANCIAL	NON FINANCIAL - 9/1/1	CITIZENSHIP	PASS
				RESIDENCY	PASS
				AGE	PASS
				SSI RECIPIENT	PASS
				MEDICAID RECIPIENT	PASS
				LIVING ARRANGEMENT PENAL INSTITUTION	PASS
				LIVING ARRANGEMENT IMD	PASS
				MEDICARE	PASS
				HEALTH INSURANCE	PASS
				ELIGIBLE FOR EMPLOYEE HI	PASS
				WILLING TO PAY PREMIUM	PASS
				NONFINANCIAL TEST RESULT	PASS
		INCOME	INCOME - 9/1/1999	BART SIMPSON: COUNTABLE UNEARNED IN CHILD SUPPORT	430.00

Print Worksheets

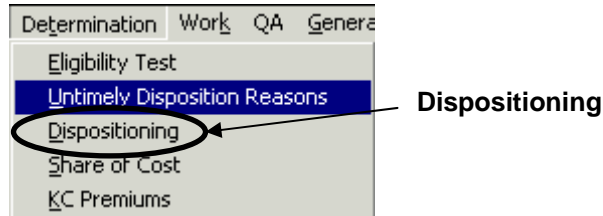
Back Find OK Cancel Forward

Applicant List

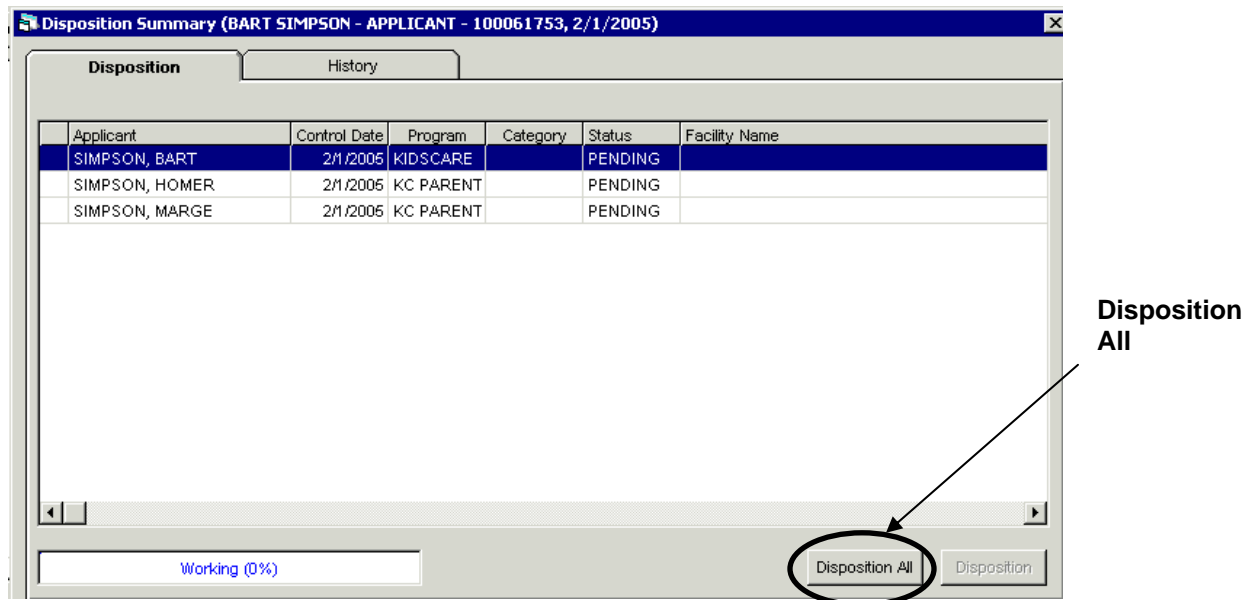
OK

n) Dispositioning

1. To start the disposition process go to the main menu and click on “**Determination**”. From the drop down menu select “**Dispositioning**”. This will take you to the “**Disposition Summary**” window.



2. Click on the “**Disposition All**” button to automatically select all applicants that are pending, and dispositions in the correct order.



3. The “**Confirm Disposition**” window appears. At the bottom of this window, the statement “**Press OK to Approve**” should appear. If this is the case, click “**OK**”.

Confirm Disposition (LEIA SKYWALKER - APPLICANT - 100062916)

Control date: 04/01/2005

You are about to Approve SKYWALKER, LUKE for KIDSCARE - FULL LTC

Action: Effective: Through:

Override reason:

SOC effective:

Select disposition reason(s):

Test Results:

Non financial:

Financial:

Medical:

Verification:

Edits:

Press OK to Approve

OK

If “Press OK to Deny” appears, press the “**Cancel All**” button.

- If the “**Non financial**” field fails, recheck the “**Worksheet**” tab on the “**Eligibility Test**” window to see what non-financial criteria the customer failed.
- If the “**Financial**” field fails, recheck the “**Relationship**” tab on the “**Group**” window to see if the household composition is correct. Also check the “**Summary**” tab on the “**Income**” window to make sure that the income is entered correctly.
- Recheck the “**Case Status Summary**” if either the “**Verification**” or “**Edits**” field fail.

Once the discrepancies are resolved, redispotion the case.

Confirm Disposition (LUKE SKYWALKER - APPLICANT - 100062913)

Control date: 04/01/2006

You are about to Deny SKYWALKER, LUKE for KIDSCARE - FULL LTC

Action: **Deny** Effective: 4/26/2005 Through:

Override reason:

SOC effective:

Select disposition reason(s):

<input type="checkbox"/>	Age 19
<input type="checkbox"/>	Citizenship Not Verified
<input type="checkbox"/>	Health insurance - Creditable coverage
<input type="checkbox"/>	Health insurance, Not verified
<input type="checkbox"/>	Income - Not Verified
<input type="checkbox"/>	Income Exceeds Limit
<input type="checkbox"/>	Jail
<input type="checkbox"/>	Medicaid - Receiving
<input type="checkbox"/>	Mental Institution
<input type="checkbox"/>	Premium - Unwilling to pay
<input type="checkbox"/>	Resident of Arizona - Not

Test Results:

Non financial: **PASS**

Financial:

Medical: **N/A**

Verification: **FAIL**

Edits: **PASS**

Press OK to Deny

If fail, check the worksheets

If fail, check income and relationships

If fail, check the Case Status Summary

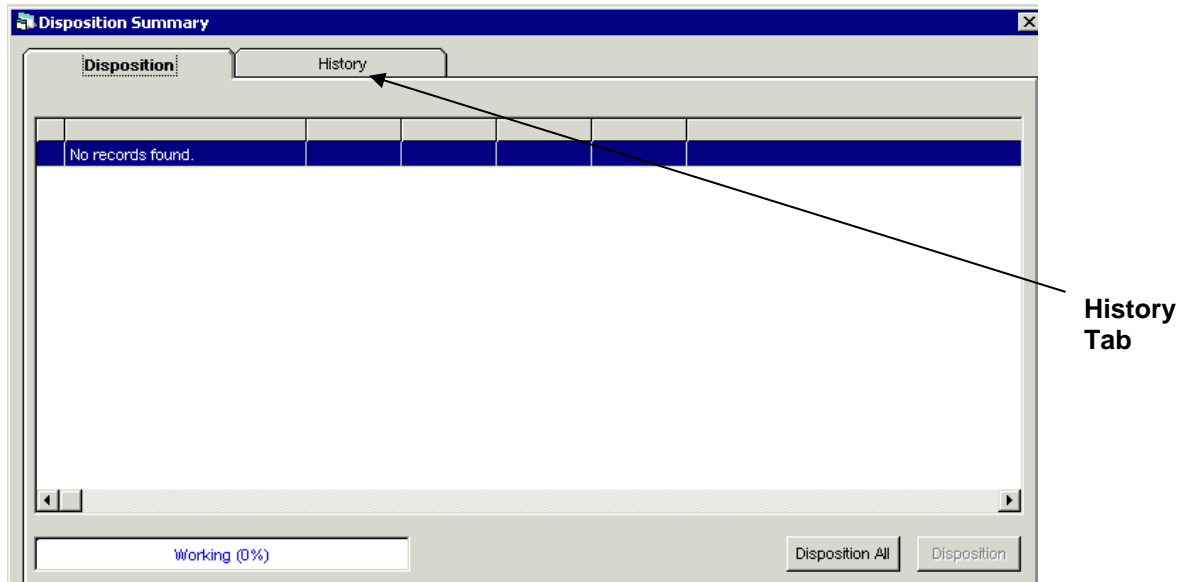
Press OK to Deny

Cancel All

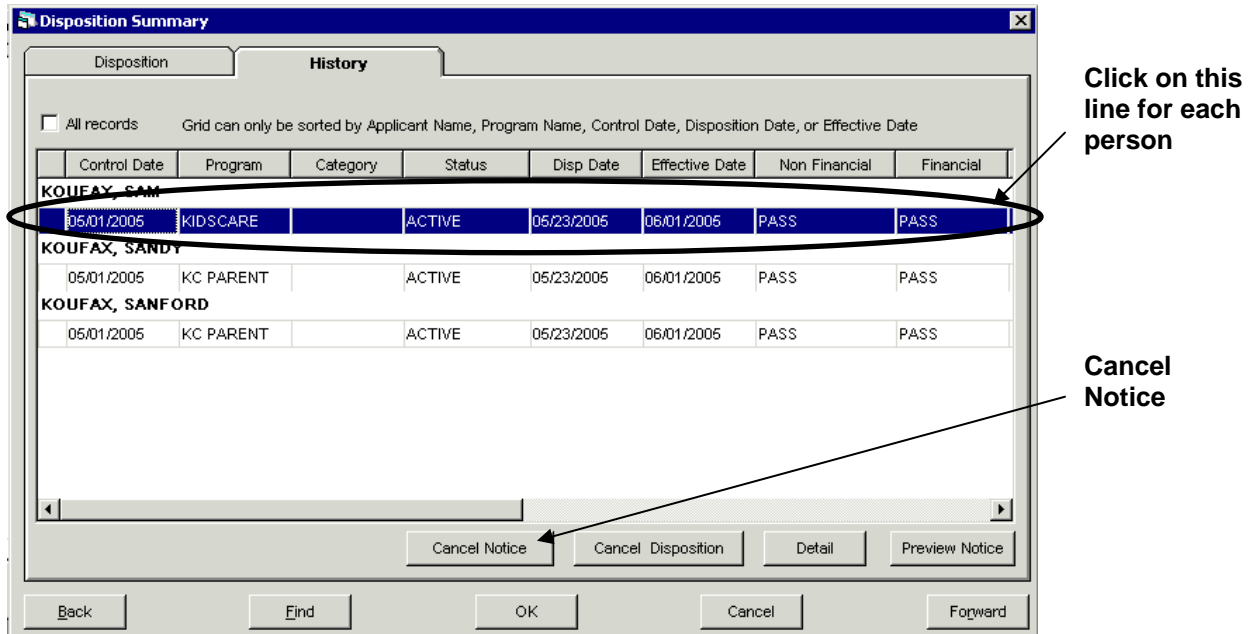
4. After pressing “OK”, ACE will bring up the “**Confirm Disposition**” window for the next applicant in the case.

o) Canceling the Notice

1. After dispositioning the case, select the “**History**” tab on the “**Disposition Summary**” window.



2. On the **"History"** tab, click the line under the name of the first approved individual and click the **"Cancel Notice"** button.



Once you click on the **"Cancel Notice"** button, the button will now show **"Reactivate Notice"**.

Disposition Summary

Disposition History

☐ All records Grid can only be sorted by Applicant Name, Program Name, Control Date, Disposition Date, or Effective Date

Control Date	Program	Category	Status	Disp Date	Effective Date	Non Financial	Financial
KOUFAX, SAM							
05/01/2005	KIDSCARE		ACTIVE	05/23/2005	06/01/2005	PASS	PASS
KOUFAX, SANDY							
05/01/2005	KC PARENT		ACTIVE	05/23/2005	06/01/2005	PASS	PASS
KOUFAX, SANFORD							
05/01/2005	KC PARENT		ACTIVE	05/23/2005	06/01/2005	PASS	PASS

Reactivate Notice Cancel Disposition Detail Preview Notice

Back Find OK Cancel Forward

Reactivate Notice

- Repeat Step 2 until all approved individuals' notices have been cancelled.
- Click **"OK"** to exit the **"Disposition Summary"** window. This is the final step in the Conversion process.

Disposition Summary

Disposition History

☐ All records Grid can only be sorted by Applicant Name, Program Name, Control Date, Disposition Date, or Effective Date

Control Date	Program	Category	Status	Disp Date	Effective Date	Non Financial	Financial
KOUFAX, SAM							
05/01/2005	KIDSCARE		ACTIVE	05/23/2005	06/01/2005	PASS	PASS
KOUFAX, SANDY							
05/01/2005	KC PARENT		ACTIVE	05/23/2005	06/01/2005	PASS	PASS
KOUFAX, SANFORD							
05/01/2005	KC PARENT		ACTIVE	05/23/2005	06/01/2005	PASS	PASS

Reactivate Notice Cancel Disposition Detail Preview Notice

Back Find OK Cancel Forward

OK